LARCH

User Guide

for

UKRR Member Libraries

Table of Contents

Table of Contents **1**

What is LARCH? **3**

Technical Requirements 3

Getting Started **4**

Creating a user 4

Creating or resetting a password 4

Forgotten username 8

Logging in to LARCH 11

Changing user roles or details 12

Logging out of LARCH 13

Getting to know your way around LARCH **14**

Making data visible 14

Visibility of cycles 15

Offered / Max Metreage and Holdings 15

Alerts **16**

Offering holdings to UKRR: uploading a list **17**

Using the correct template 17

How to upload a list of holdings 17

Upload failure: Data validation 21

The data validation rules – offered holdings 22

Reattempting submission of a list previously failed 23

Offering holdings to UKRR: manually adding lists and holdings **25**

Manually creating a list in LARCH. 25

Manually adding holdings to a list 27

Adding user defined data 30

Submitting holdings **32**

Withdrawing an item **34**

Editing holdings and lists **36**

Editing individual holdings 36

Editing the list 38

Downloading Retention Values and BL Requests **39**

Reports **41**

Visibility of reports 41

Location of reports in LARCH 41

Additional Report buttons 42

Downloading reports in different formats 43

Appendix 1: What emails are received by which user role? **44**

Appendix 2: What reports are visible to which user role? **45**

What is LARCH?

LARCH stands for **L**inked **A**utomated **R**egister of **C**ollaborative **H**oldings. The system has been designed based on the requirements agreed between the UK Research Reserve (UKRR), the British Library (BL) and UKRR member libraries. The system functionality supports the key business processes involved in managing the preservation of low use print research publications.

LARCH is managed by UKRR, so if you have any queries regarding this user guide or need access to the system please email larch@ukrr.ac.uk

To access LARCH go to http://www.ukrr.ac.uk/larch. You may wish to save this as one of your favourites.

Technical Requirements

LARCH is supported on the following browsers - Internet Explorer 7 or 8 or Firefox 3.5 or 3.6.8. It may work on other browsers such as Safari and Chrome but will not be supported on these. If you are not certain that you have one of these supported browsers please contact your local IT administrator.

Getting Started

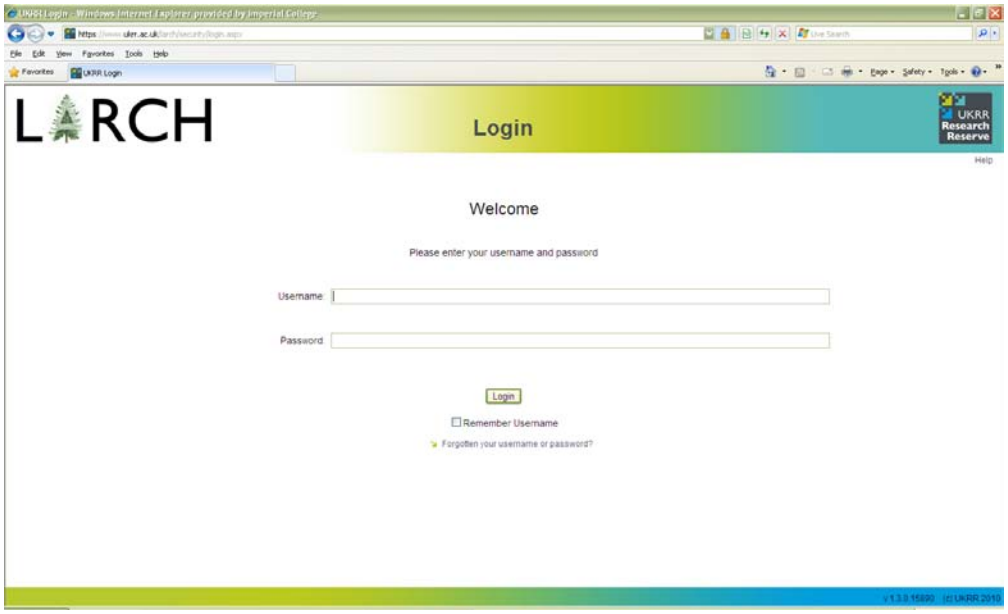
Creating a user

User accounts can only be created by UKRR administrators. Your institution's UKRR contact will have been asked for a list of people who need access to LARCH before it went live, however people come and go so user accounts can easily be created or deactivated. If you need a new account created or if someone will no longer require access please contact UKRR with the name and email address of the person requiring access. Please note that if someone is leaving your institution and they have access to LARCH, it is the responsibility of the institution to notify UKRR that the user account needs to be deactivated.

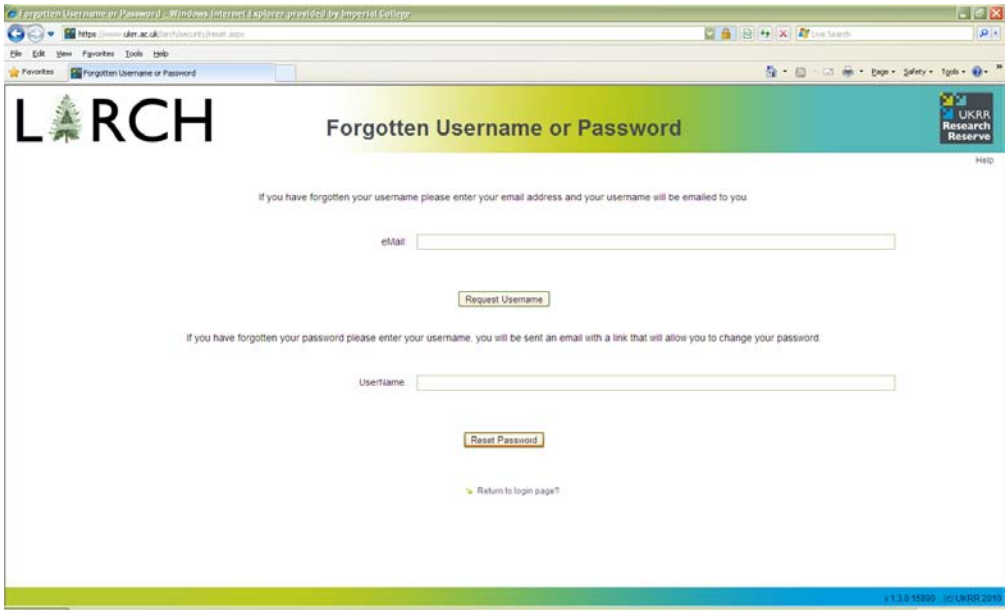
Once UKRR have created the user account a welcome email will be sent and the user will be ready to start using LARCH.

Creating or resetting a password

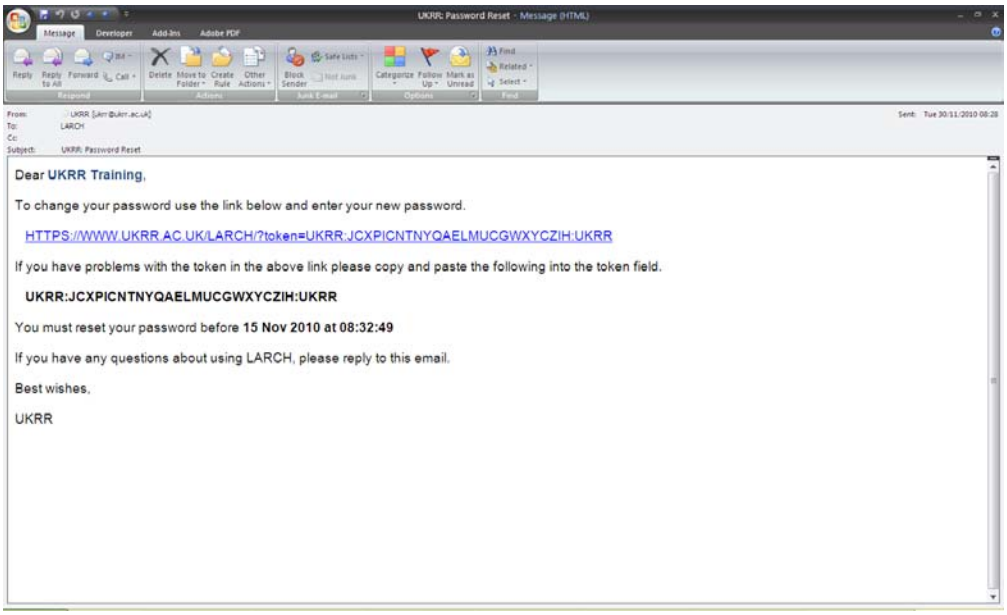
Step	Action
1.	If you know your username go to the LARCH login page at http://www.ukrr.ac.uk/larch **Note:** If this is the first time you have logged on to LARCH your username will be in the welcome email that was sent automatically when your user account was created. If you don't know your username but think you have a LARCH user account, go on to the section called Forgotten username below to find out how to retrieve your username and then come back to this section to reset your password.



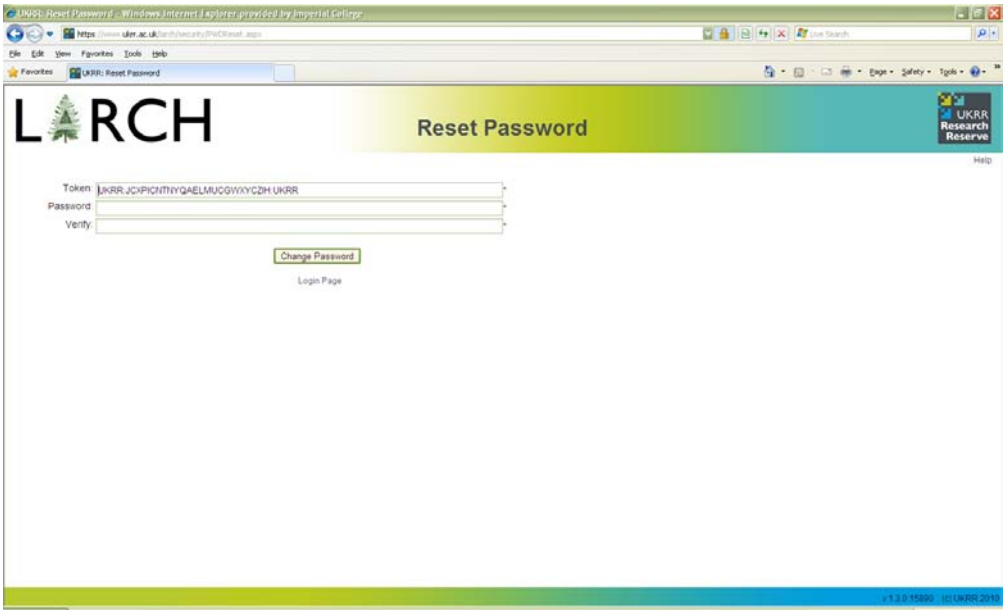
Step	Action
2.	Click the **Forgotten your username or password?** link, which will take you to the following page.


LARCH
Forgotten Username or Password
UKRR Research Reserve
Help
If you have forgotten your username please enter your email address and your username will be emailed to you
eMail:
Request Username
If you have forgotten your password please enter your username, you will be sent an email with a link that will allow you to change your password
UserName:
Reset Password
Return to login page?

Step	Action
3.	Click in the **Enter User Name** field and type in your username, for example, "**larchtrain**".
4.	Click the **Reset Password** button.
5.	Go to your email account and check your new messages.
6.	Find the email from LARCH admin with a subject of **UKRR: Password Reset.** Open this email.


UKRR: Password Reset - Message (HTML)
Dear UKRR Training,
To change your password use the link below and enter your new password.
HTTPS://WWW.UKRR.AC.UK/LARCH/?token=UKRR:JCXPICNTNYQAELMUCGWXYCZIH:UKRR
If you have problems with the token in the above link please copy and paste the following into the token field.
UKRR:JCXPICNTNYQAELMUCGWXYCZIH:UKRR
You must reset your password before 15 Nov 2010 at 08:32:49
If you have any questions about using LARCH, please reply to this email.
Best wishes,
UKRR

Step	Action
7.	Click the link within the email to create or change your password. This will take you to the password reset page in LARCH

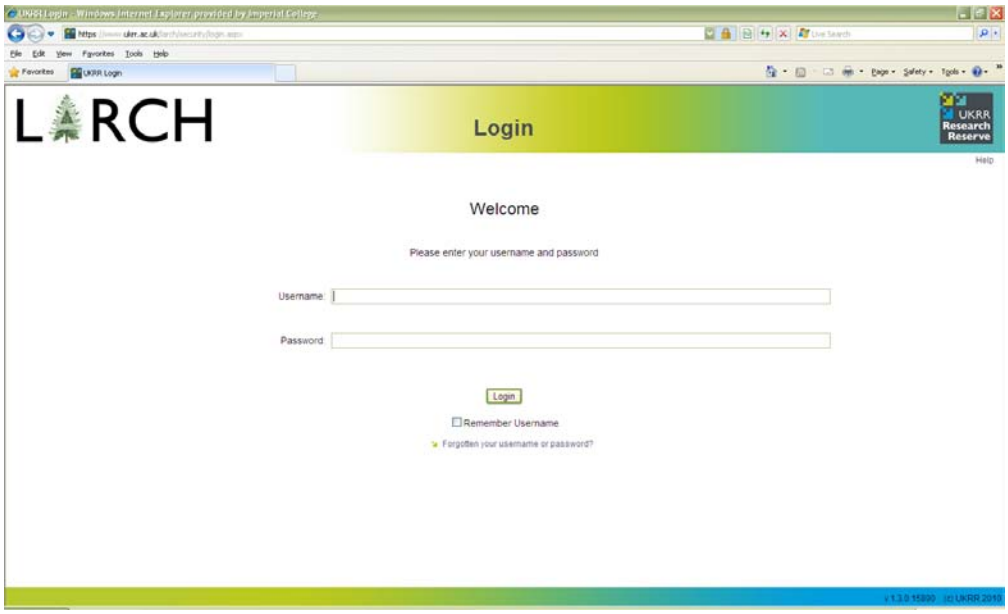


Step	Action
8.	Type your password in the 'Password' field. Your password must have at least 8 characters and should contain all of the following: Capital letter, Number, Special character (e.g. @!#$%^&*/_\|\?:;+-). For example, "**Tra1ning$**" would be acceptable but "**Training**" would not.
9.	Re-enter your password in the 'Verify' field.
10.	Click the **Change Password** button. If both passwords are not the same then you will see an error message displayed and will need to repeat the two steps above.
11.	Once you have changed your password click the **Login Page** link.

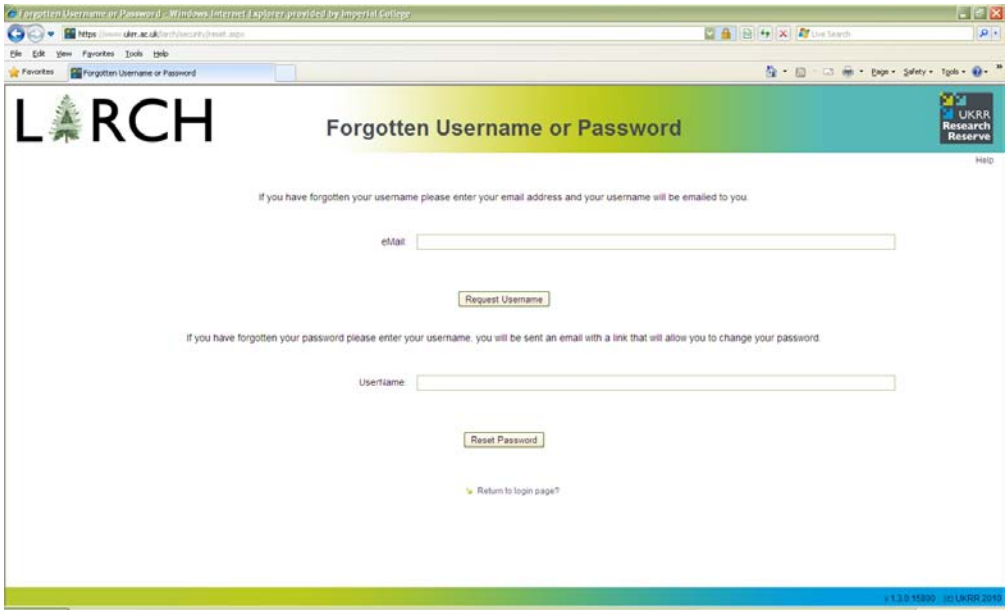
Forgotten username

When they create an account for you, UKRR will assign you a username. If you have forgotten what it is you can follow these steps to receive a reminder.

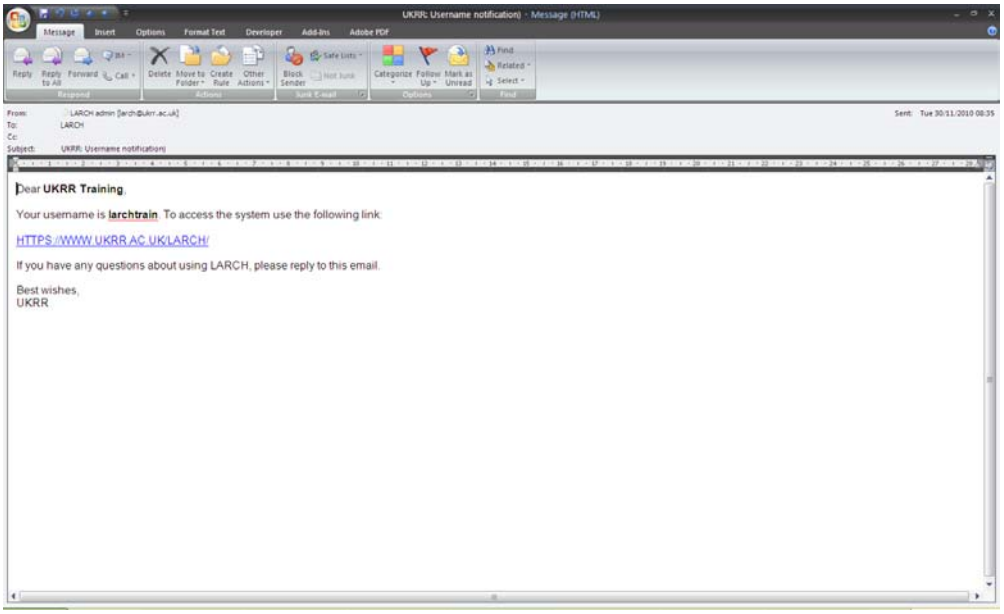
Step	Action
1.	Go to http://www.ukrr.ac.uk/larch



Step	Action
2.	Click the **Forgotten your username or password?** link. You'll be taken to the screen shown below.


Forgotten Username or Password - Windows Internet Explorer provided by Imperial College
Favorites
Forgotten Username or Password
LARCH
Forgotten Username or Password
UKRR Research Reserve
Help
If you have forgotten your username please enter your email address and your username will be emailed to you.
eMail:
Request Username
If you have forgotten your password please enter your username, you will be sent an email with a link that will allow you to change your password.
UserName:
Reset Password
Return to login page?

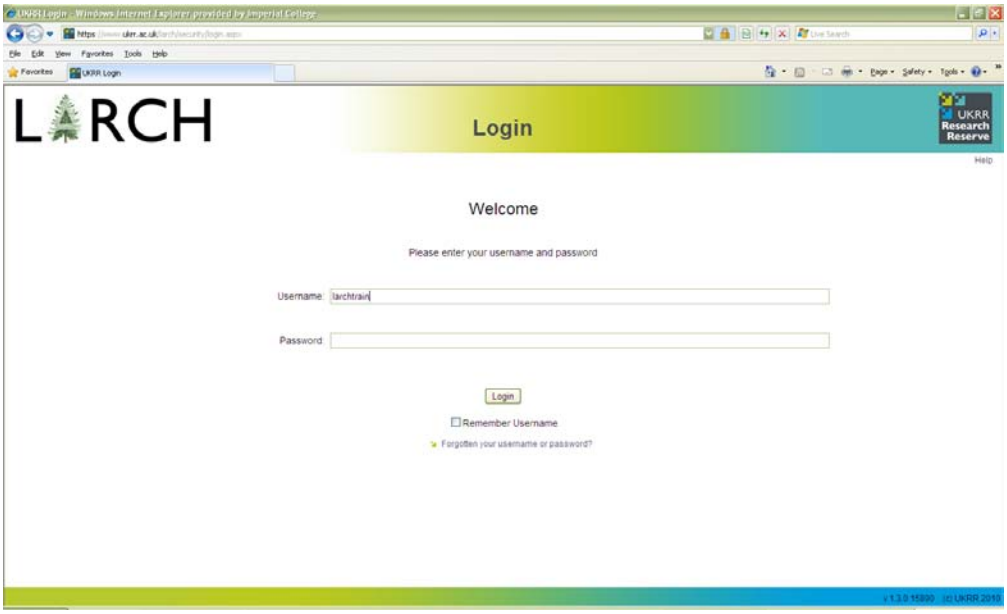
Step	Action
3.	Enter your email address in the ‘eMail field’.
4.	Click the **Request Username** button.
5.	Go to your email and look for an email from LARCH admin with the subject **UKRR: Username notification**. Open this email.



Step	Action
6.	Your username is in the first sentence of the email. Click on the link in the email which will take you to the LARCH login screen.
7.	You should now be able to log in. If however, you have also forgotten your password or if you are activating a new account you will need to follow the steps in the section Creating or Resetting a Password above, in order to set it.

Logging in to LARCH

Step	Action
1.	Go to http://www.ukrr.ac.uk/larch.
2.	Enter your username into the **Username:** field. For example, "**larchtrain**".



Step	Action
3.	Enter your password.
4.	Click the **Login** button.
5.	You will be logged in and taken to the main menu in LARCH.

Note: If you want to you can tick the **Remember Username** box and your username will be automatically completed when you come to this page again using the same computer.

Changing user roles or details

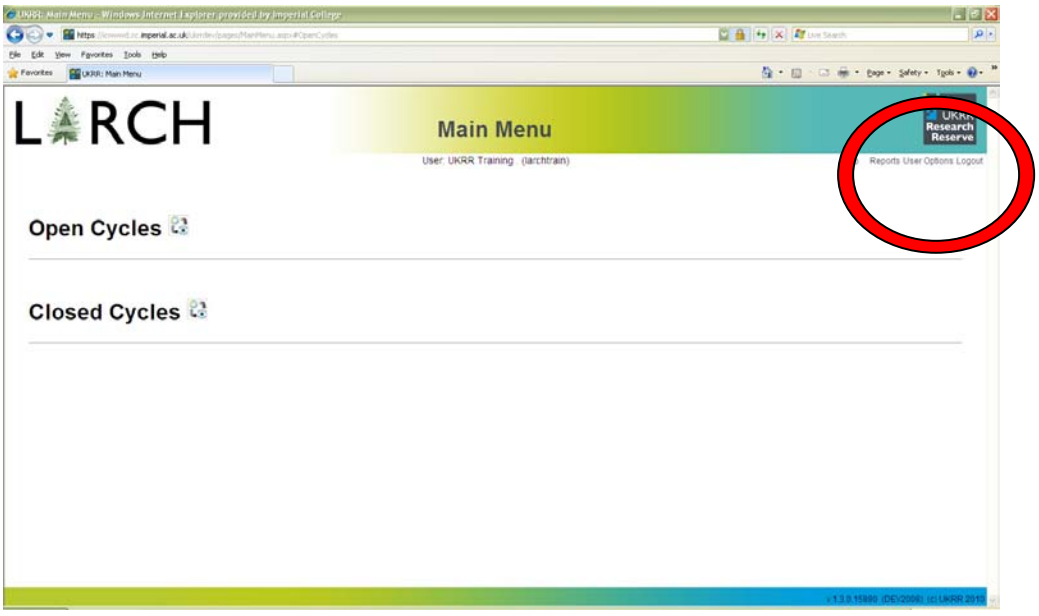
Member library users of LARCH can choose from a variety of different user profiles, which reflect the different interactions between UKRR, the BL and member libraries. The different user profiles don't affect what you can do in LARCH, but they do impact on which email alerts you receive and the visibility of some reports. For example if the material you are offering is stored off site it may be useful for someone at that location to have the role of 'ML Sample Request' so that any requests from the BL will go straight to them, rather than to someone at the central library who has the role of general admin.

As different members have different organisational structures the user profiles are not mutually exclusive and you can opt to be as many or as few of them as you wish. It is worthwhile ensuring that the ML Main Contact and ML Sample Request roles are held by at least one person at your institution, as otherwise you may not receive all alerts which could delay the progress of your submission.

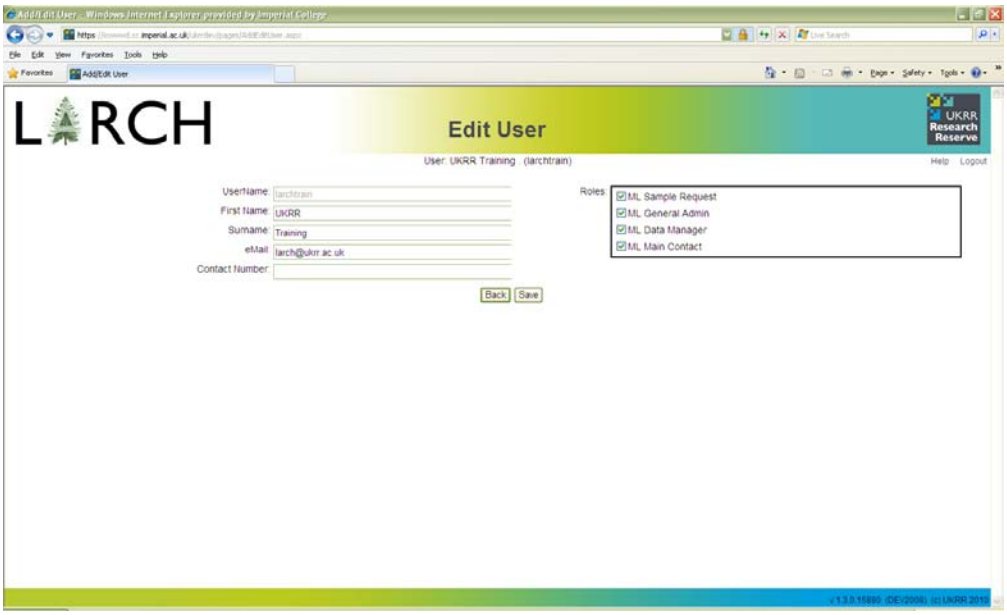
Only the individual user or a UKRR administrator can change a user's profile. You cannot change the profile of other LARCH users from your institution. Note that your username cannot be changed by anyone.

Changing your details such as your name or email address is done from the same screen as the user role.

Step	Action
1.	Click the **User Options** link in the top right corner of the 'Main Menu'.



Step	Action
2.	If you want to change your name, email address, or contact number do this by overwriting the current details in the relevant filed on the left of the screen.
3.	If you want to change your user role click in the check box to the left of that role name, so that the box is either ticked or unticked.
4.	Once you have made your changes, click the **Save** button. If you don't want to save the changes you have made, you can use the **Back** button to exit the screen.



Logging out of LARCH

To log out of LARCH click the **Logout** link in the top right corner of any screen (just below the UKRR logo). If you have made changes to any data and they have not been saved they will be lost when you logout.

Getting to know your way around LARCH

There are a number of different screens in LARCH. The most important screen is the Main Menu which contains data about all your submissions and acts as a dashboard for your institution's UKRR activities.

Throughout LARCH buttons with icons on them are used to perform various functions, in the same way they do in many other programs you may use on a computer. The icon that appears on the button is indicative of the function if performs, however if you're unsure about the meaning of the icon you can hover your mouse over it and you'll see a short text description.

Making data visible

The Main Menu is divided up into open and closed cycles, with the open cycle being at the top of the page. The main menu can get quite busy if you have offered a lot of lists, so in order to save screen space you can collapse or expand the page at various levels to show different data. When you first log on the Main Menu will look blank, because all the cycles will be collapsed. If your institution has offered material to UKRR in the past you can view the details by clicking on the following icons.

	This icon toggles the open or all the closed cycles to expand or collapse their visibility.
	This icon toggles the visibility of individual cycles.
	This icon will allow you to expand or collapse individual lists of offered holdings within the cycle.

If you're new to LARCH and your institution has offered material in the past, it may be worth looking through the closed cycles to see how the expanding and collapsing of data works. It may seem confusing at first, however once you have a few cycle lists in LARCH it is very useful to be able to hide the data relating to past cycles and concentrate on what is current, or vice-versa.

The different levels of open/closed cycles, individual cycles and list are also reflected in the reporting functions which have similar icons:

	This icon shows reports that run against data in open and closed cycles.
	This icon shows reports that run against data in a specific cycle.
	This icon shows reports that run against data in a specific list.

Reporting is covered in more detail in its own section below.

Visibility of cycles

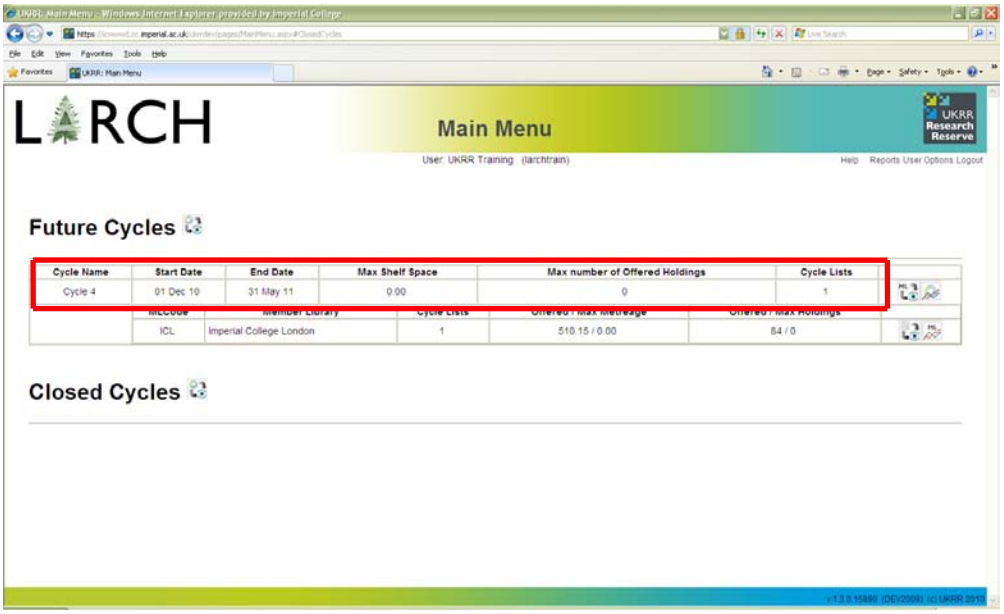
In the final months of a cycle your institutions main contact will be contacted by the UKRR Manager in order to determine your intentions for the coming de-duplication cycle. Assuming the amount of material you indicate you will be offering is approved by the UKRR Selection Panel, the new cycle will become visible to you in LARCH on the date it opens (usually either the 1st of December or the 1st of June). If your institution has not indicated their intention to be active in a cycle or if the request was declined by the Selection Panel, the cycle will not be visible to you. Similarly if you have not offered any holdings in a previous cycle there will be no data for you to see in that cycle and it will not be visible.

Offered / Max Metreage and Holdings

When you expand the data relating to a cycle you will see the screen below. More or less icons may be visible depending on whether the cycle is in the future, open, or closed. The name and start and end dates of the cycle are given for your information.

The **Max Shelf Space** and **Max Number of Offered Holdings** shown on the row beside the cycle name and dates are the amounts that you can offer during the cycle as agreed by the Selection Panel.

Offered Metreage and **Offered Holdings** show how many metres and titles you have uploaded into the cycle. They are given against the Maximum Metreage and Maximum Holdings which is the amount the UKRR Selection Panel agreed you could offer during the cycle.



Alerts

LARCH is programmed to send automated emails (alerts) when certain actions are performed. All the emails mentioned above in the Getting Started section are alerts that relate to actions being made against your user profile (e.g. password reset), however most of the alerts you receive once you are using LARCH will relate to lists or individual offered holdings. If there are any problems with the holdings you upload or enter into LARCH then they will generate alerts in various forms.

Because you are unlikely to be logging on to LARCH on a regular basis once your holdings have been submitted in a cycle, the alerts are sent to inform you that something has either changed or requires your attention.

The alerts you will most commonly receive are likely to be BL Sample requests, which are formatted to double as a packing list for the item being sent to the BL, and the alert saying the retention values for your list is available to be downloaded.

As mentioned in the Changing User Roles or Details section above, your user role determines which alerts you will receive. You can see which user roles receive which alerts by checking Appendix 1: What emails are received by which user role? If the number of alerts you are receiving is more that you'd like, you can change your user roles so that you're only signed up for a profile that receives the relevant ones. If you're the sole user of the LARCH at your institution you should have the **Main Contact** and **Sample Request** roles to ensure that you at least receive all relevant alerts.

Note that if you have two profiles that are both due to receive an alert, you will only receive the alert once.

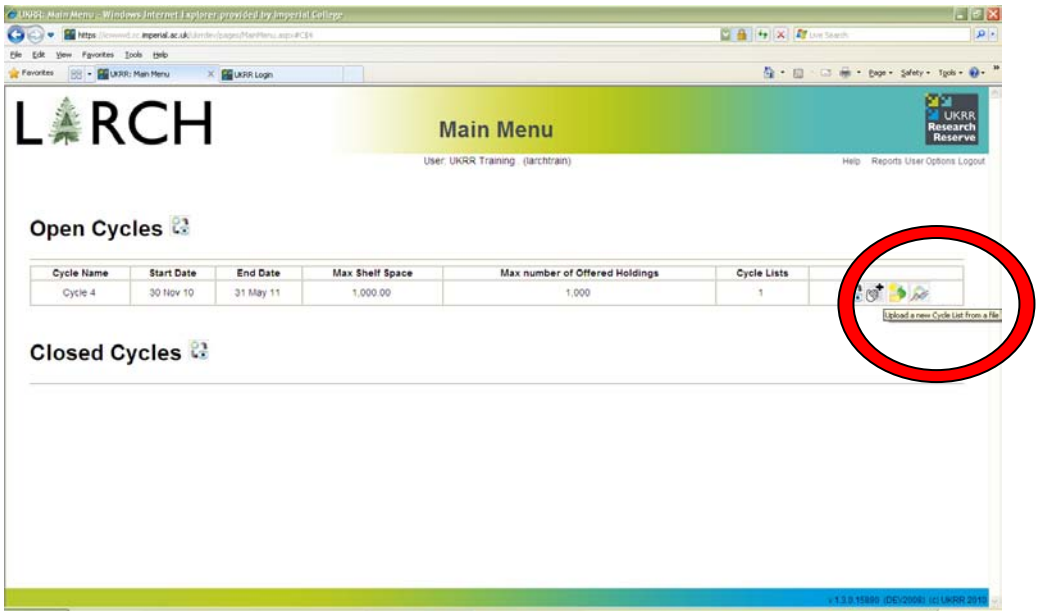
Offering holdings to UKRR: uploading a list

Using the correct template

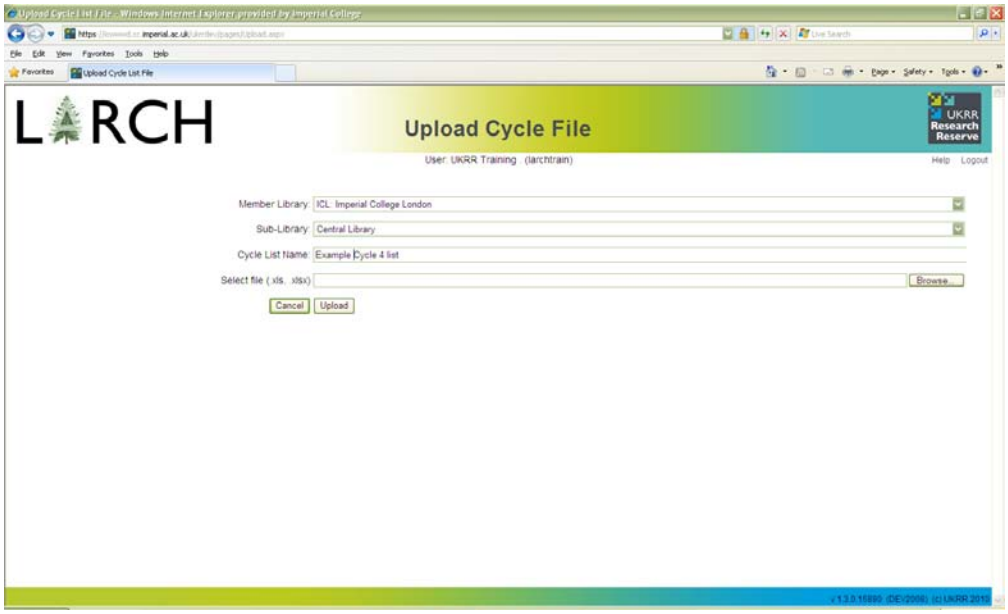
If you are uploading a list of offered holdings ensure you are using the UKRR offered holdings template dated May 2010 or later, which can be downloaded from the Member's Resources section of the UKRR website. The date of the template is given in the name of the original file, e.g. **UKRR_offered_journals_template-May-10.xls.** LARCH has been specifically designed to extract the data from this template, so if you are using an earlier template it is very likely the data upload will fail. One quick way to tell if the template you have is suitable is that all May 2010 or later versions only have two tabs, whereas previous versions had six tabs.

How to upload a list of holdings

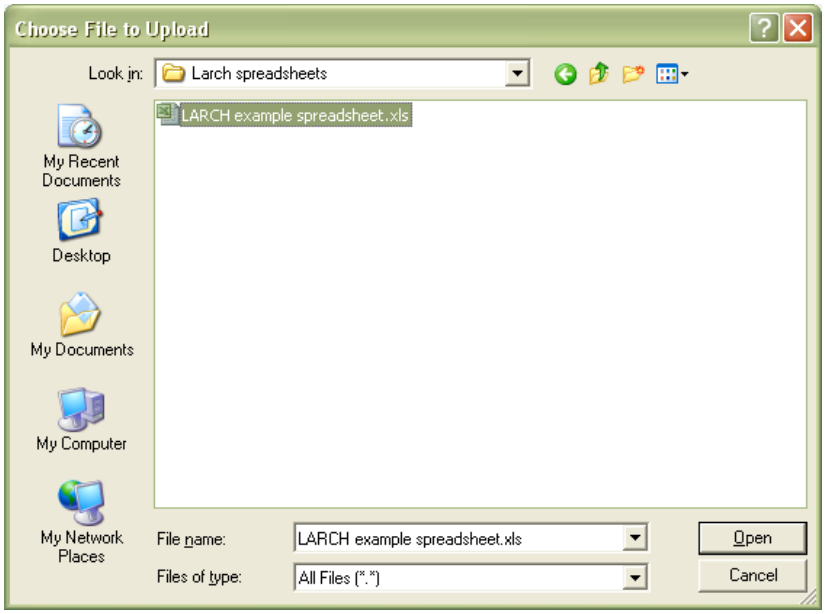
Step	Action
1.	You can only upload a cycle list into a cycle which is open. To do this click the **Upload a new Cycle List from a file** icon (shown below), which will be to the right of the line giving the name and start / end dates of the cycle.



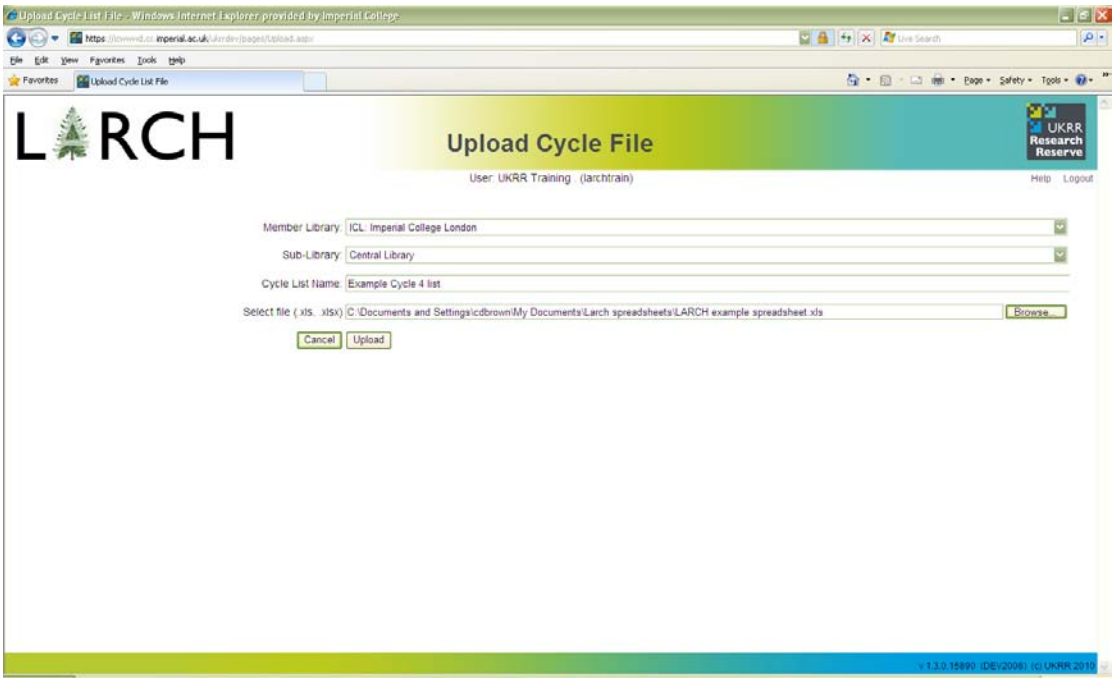
Step	Action
2.	You will be taken to the **Upload Cycle File** page. Your institution will be automatically selected in the 'Member Library' field.
3.	Use the drop down menu to select from a list of sub-libraries that UKRR is aware of. If the library you want to use isn't on the list select the **(None)** option and email larch@ukrr.ac.uk so the library can be added for you. You can amend the list using the Editing the list option below once the sub-library has been added.
4.	Give your list a meaningful name which will allow you to identify it in future.



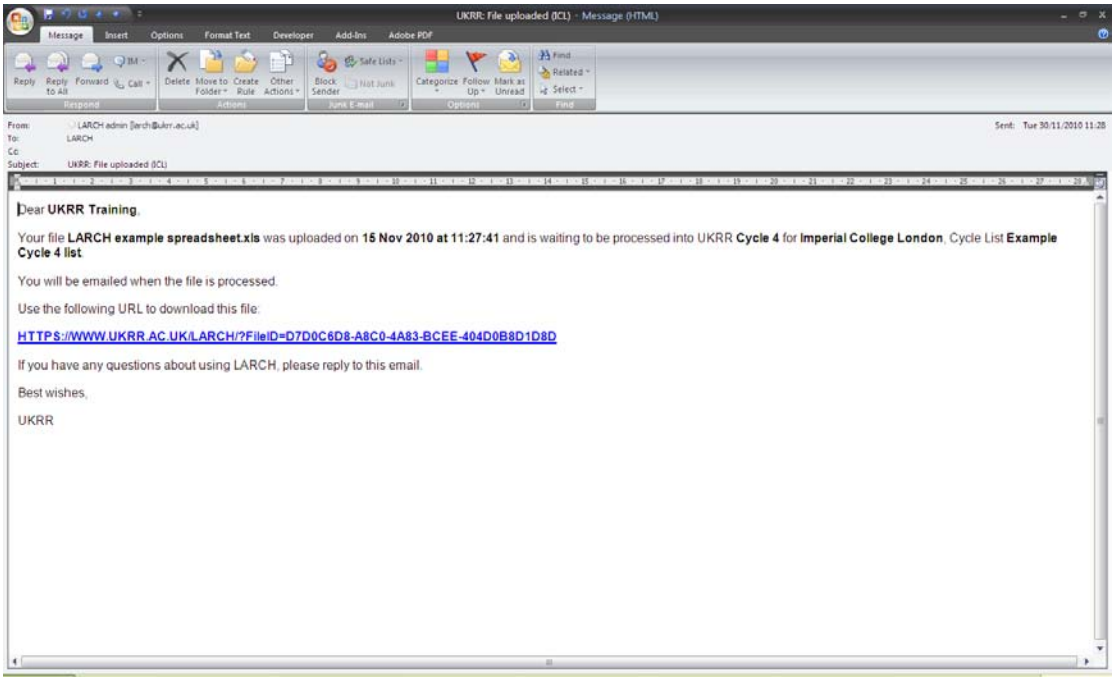
Step	Action
5.	Click on the **Browse** button to the right of 'Select File'. A window will appear which you can use to navigate to the file you wish to upload. Once you have found the file click **Open**.



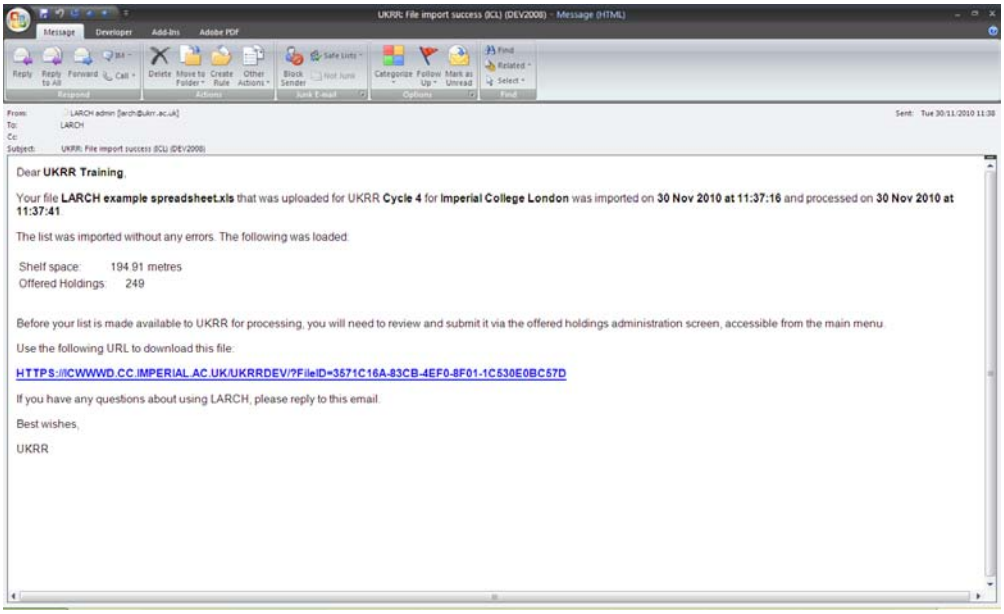
Step	Action
6.	Click the **Upload** button.



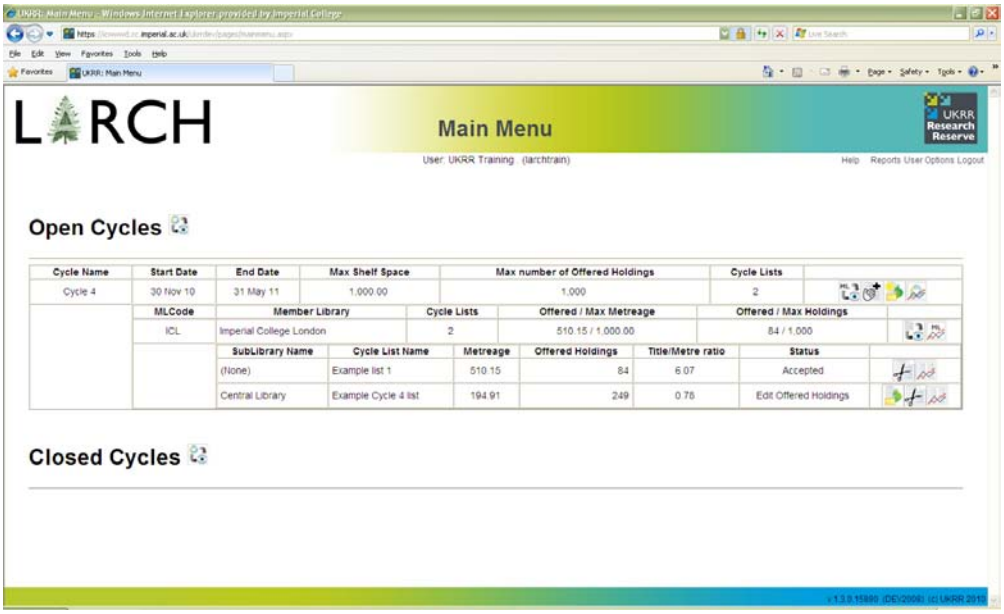
Step	Action
7.	Uploading the file will create the list record, and you will be sent an email to confirm that the upload is taking place.


UKRR: File uploaded (ICL) - Message (HTML)
Dear UKRR Training,
Your file LARCH example spreadsheet.xls was uploaded on 15 Nov 2010 at 11:27:41 and is waiting to be processed into UKRR Cycle 4 for Imperial College London. Cycle List Example Cycle 4 list
You will be emailed when the file is processed.
Use the following URL to download this file:
HTTPS://WWW.UKRR.AC.UK/LARCH/?FileID=D7D0C6D8-A8C0-4A83-BCEE-404D0B8D1D8D
If you have any questions about using LARCH, please reply to this email.
Best wishes,
UKRR

Step	Action
8.	If the upload is successful you will receive an email titled 'UKRR: File import success' giving the number of holdings and the metreage of the material you have uploaded.


UKRR: File import success (ICL) (DEV2008) - Message (HTML)
Dear UKRR Training,
Your file LARCH example spreadsheet.xls that was uploaded for UKRR Cycle 4 for Imperial College London was imported on 30 Nov 2010 at 11:37:16 and processed on 30 Nov 2010 at 11:37:41.
The list was imported without any errors. The following was loaded:
Shelf space: 194.91 metres
Offered Holdings: 249
Before your list is made available to UKRR for processing, you will need to review and submit it via the offered holdings administration screen, accessible from the main menu.
Use the following URL to download this file:
HTTPS://ICWWWD.CC.IMPERIAL.AC.UK/UKRRDEV/?FileID=3571C16A-83CB-4EF0-8F01-1C530E0BC57D
If you have any questions about using LARCH, please reply to this email.
Best wishes,
UKRR

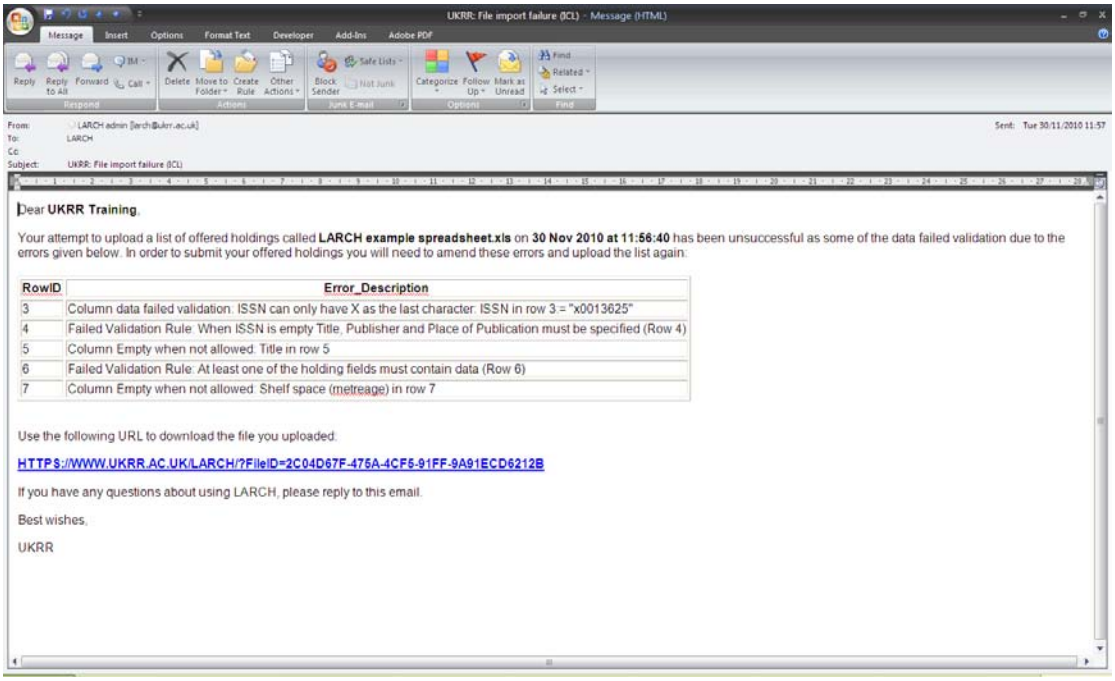
Step	Action
9.	The list will now appear on the Main Menu as shown below. You can see that the metreage and number of holdings for the lists is shown alongside them, whilst the total of these figures is given above.



Step	Action
10.	In order to complete the submission of your list you will need to manually review and submit the list. See the section starting on page 33 below on how to do this.

Upload failure: Data validation

In order to process offered holdings, UKRR and the BL require various pieces of information to be provided by the Member Library. When importing data LARCH automatically checks that these pieces of information are present and are valid. If any of the data is missing or is not in a format that would be expected then the file upload will fail. If this happens rather than receiving the File Import Success email mentioned above, you will receive a File Import Failure email. The failure email will show which row the error is on, and explain what the error is.


UKRR: File import failure (ICL) - Message (HTML)
Dear UKRR Training,
Your attempt to upload a list of offered holdings called LARCH example spreadsheet.xls on 30 Nov 2010 at 11:56:40 has been unsuccessful as some of the data failed validation due to the errors given below. In order to submit your offered holdings you will need to amend these errors and upload the list again.
RowID
Error_Description
3
Column data failed validation: ISSN can only have X as the last character: ISSN in row 3 = "x0013625"
4
Failed Validation Rule: When ISSN is empty Title, Publisher and Place of Publication must be specified (Row 4)
5
Column Empty when not allowed: Title in row 5
6
Failed Validation Rule: At least one of the holding fields must contain data (Row 6)
7
Column Empty when not allowed: Shelf space (metreage) in row 7
Use the following URL to download the file you uploaded:
HTTPS://WWW.UKRR.AC.UK/LARCH/?FileID=2C04D67F-475A-4CF5-91FF-9A91ECD6212B
If you have any questions about using LARCH, please reply to this email.
Best wishes,
UKRR

By working your way through a failed list and correcting the errors shown in the File Import Failure email you will be able to amend the lost so that it will be accepted into LARCH.

The data validation rules – offered holdings

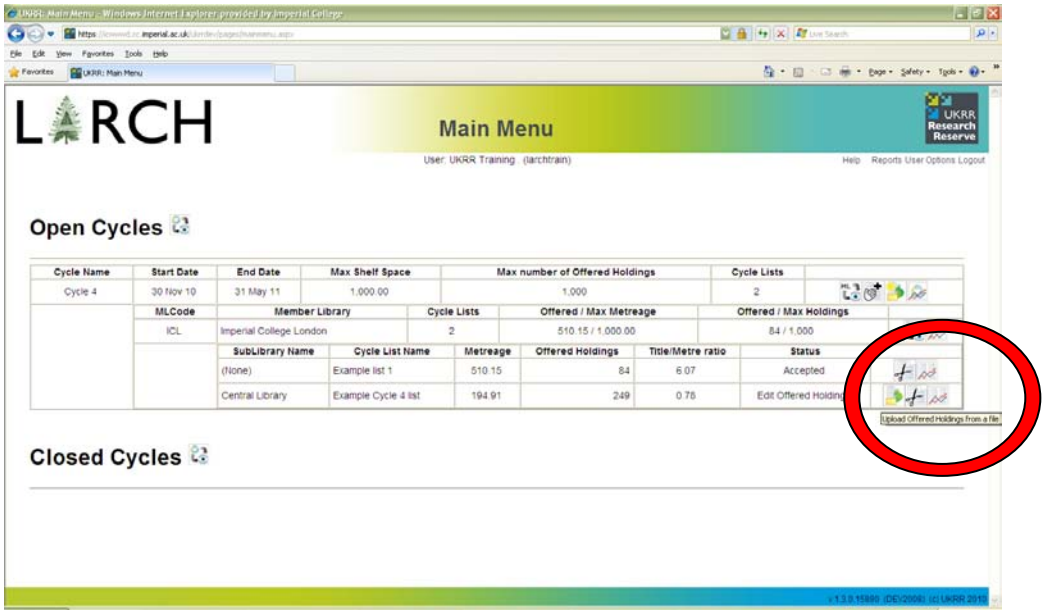
The various validation rules applied to data are shown in the table below.

Data item	Rule
UKRRid	Must be present
ISSN	ISSN must be 8 characters long (excluding hyphen)
	ISSN must contain only 0-9 and X characters only (excluding hyphen)
	X can only be present in ISSN as the last character
Title	Must be present if data is present elsewhere on the row
Publisher	Must be present if ISSN is absent
Place of Publication	Must be present if ISSN is absent
Holdings	At least one of the holdings fields (including supplement) must contain data
Shelf space	Must be present. Is a valid numeric value

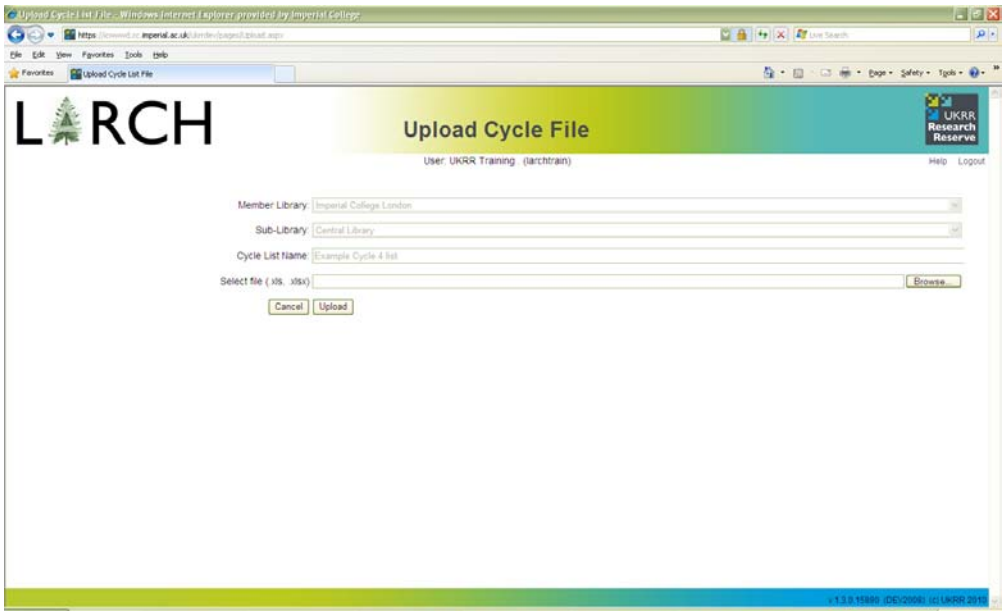
Reattempting submission of a list previously failed

The process is essentially the same as what you would have done to upload the list in the first place, however you don't need to create the list details as they are already there.

Step	Action
1.	If the list details have been created but the holdings but not yet been submitted to UKRR, then use the **Upload a new Cycle List from a file** icon (shown below) which will be showing to the right of the line giving the list name and metreage/number of offered holdings. **Note**: this is a different place to where you clicked when you created the list.



Step	Action
2.	The sub library details and list name will already be completed (and cannot be changed on the File Upload page – if you want to change them see the section on Editing Items and lists below). Use the **Browse** button to locate the correct file as you did before, and then click **Upload**.



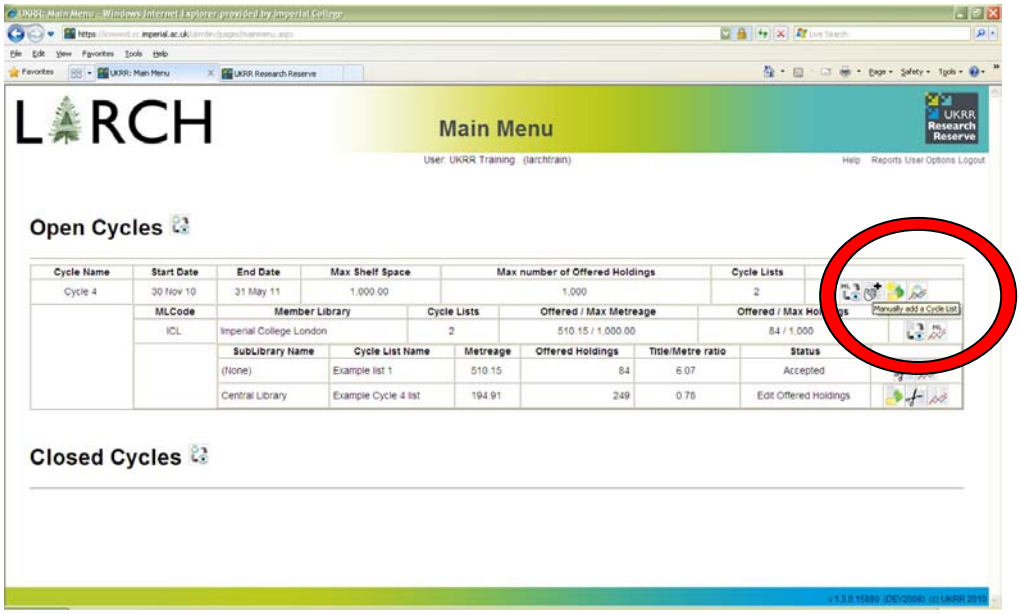
Step	Action
3.	You will receive the 'File Uploaded' email again, and assuming all validation errors have been corrected the data will be imported into LARCH. If not, correct the errors in the latest 'File Import Failure' email you received and repeat the upload process until the upload is successful.
4.	As mentioned above, in order to complete the submission of your list you will need to review and submit the list manually. This is covered in the Submitting holdings section below.

Offering holdings to UKRR: manually adding lists and holdings

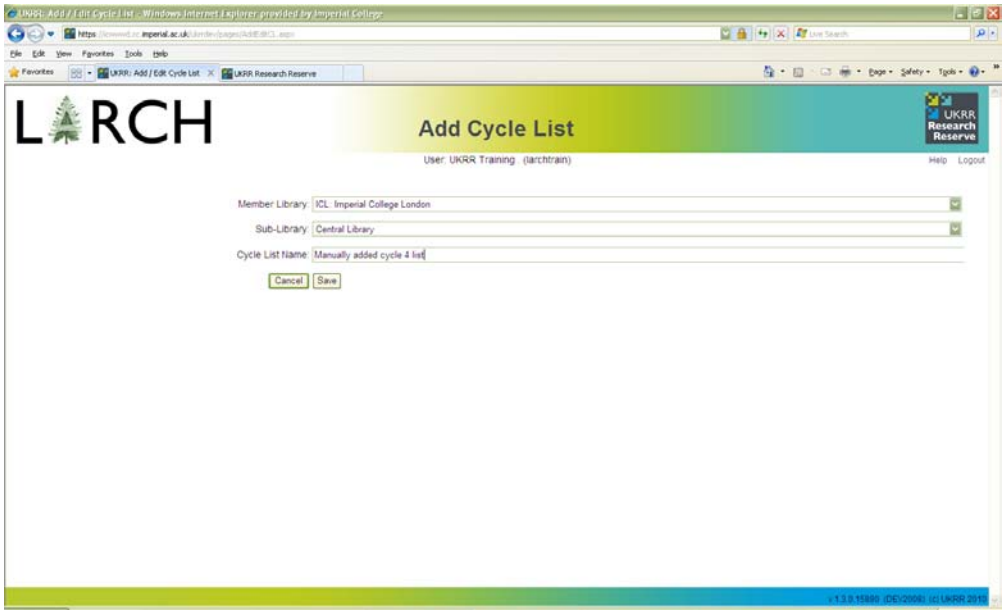
As well as uploading holdings from the template, you can also manually create a list of offered holdings, or manually add holdings to a list uploaded from the template. This can be useful if you only have one item to offer, or if you have a few items that you want to add to a list that has already been uploaded.

Manually creating a list in LARCH.

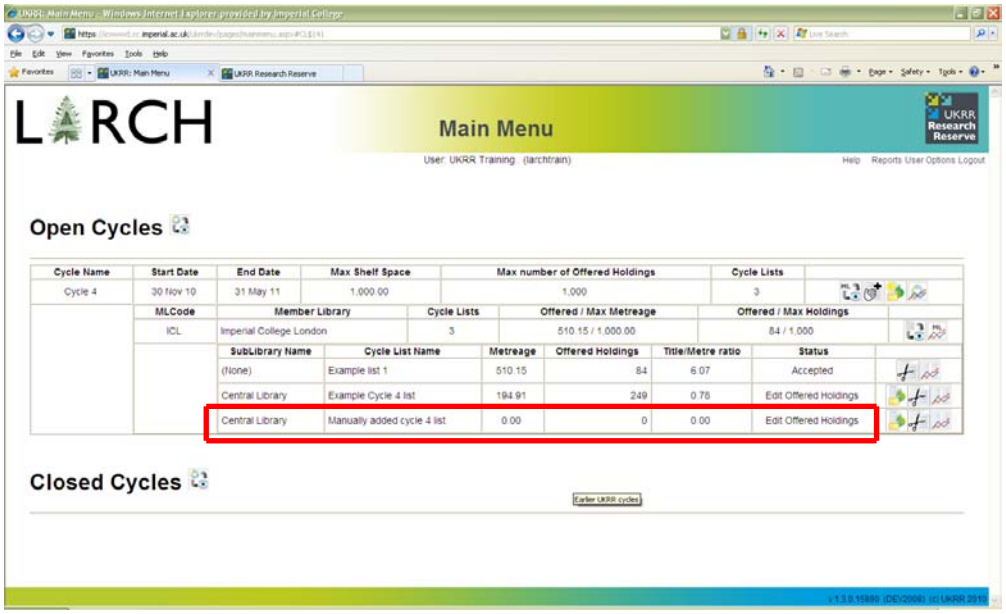
Step	Action
1.	Click on the **Manually Add a Cycle List** icon (shown below) which is located to the right of the Cycle name and start/end dates.



Step	Action
2.	Use the drop down menu to select from a list of sub-libraries that UKRR is aware of. If the sub-library you want to use isn't on the list select the **(None)** option and email larch@ukrr.ac.uk so the library can be added for you. You can amend the list using the Editing the list option below once the sub-library has been added.
3.	Give your list a meaningful name which will allow you to identify it in future.
4.	Click the **Save** button.



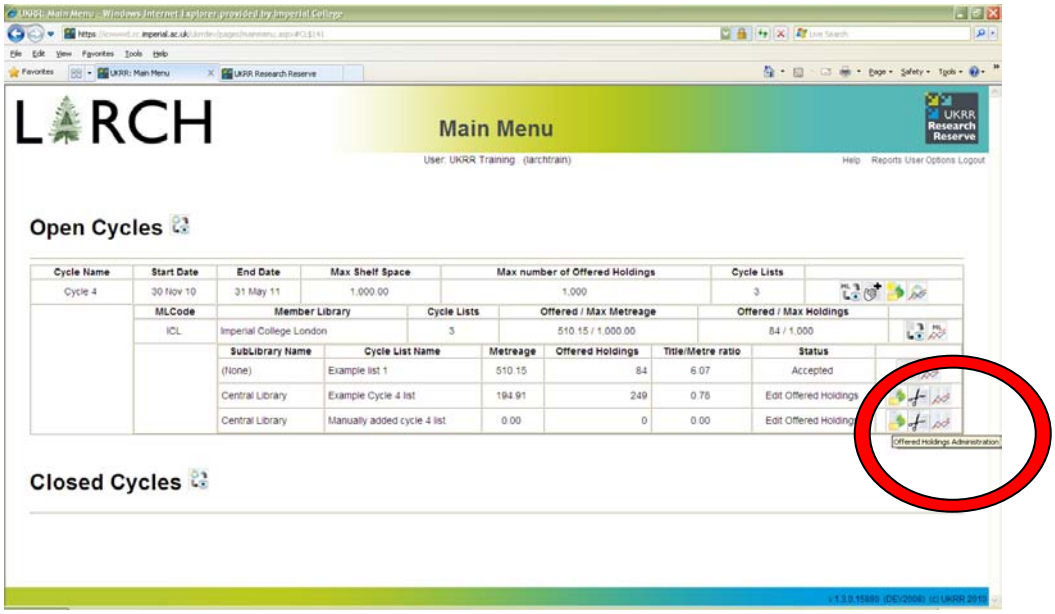
Step	Action
5.	The list will now be showing on the Main Menu with no metreage or offered holdings.



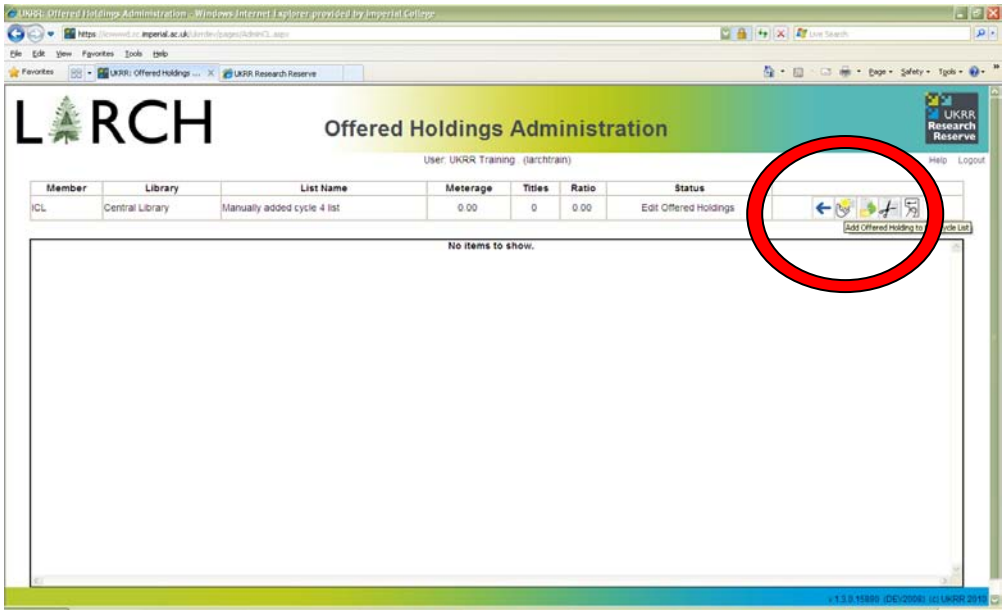
Manually adding holdings to a list

Note: You can only add holdings to a list that has the status **Edit Offered Holdings**, or **Post-Submit Edit**. If you want to add holdings to a list that has already been submitted you will need to contact UKRR first to explain the situation, as they will need to re-open the list. It's quite likely they will prefer you to submit the items on a new list to avoid any mix ups.

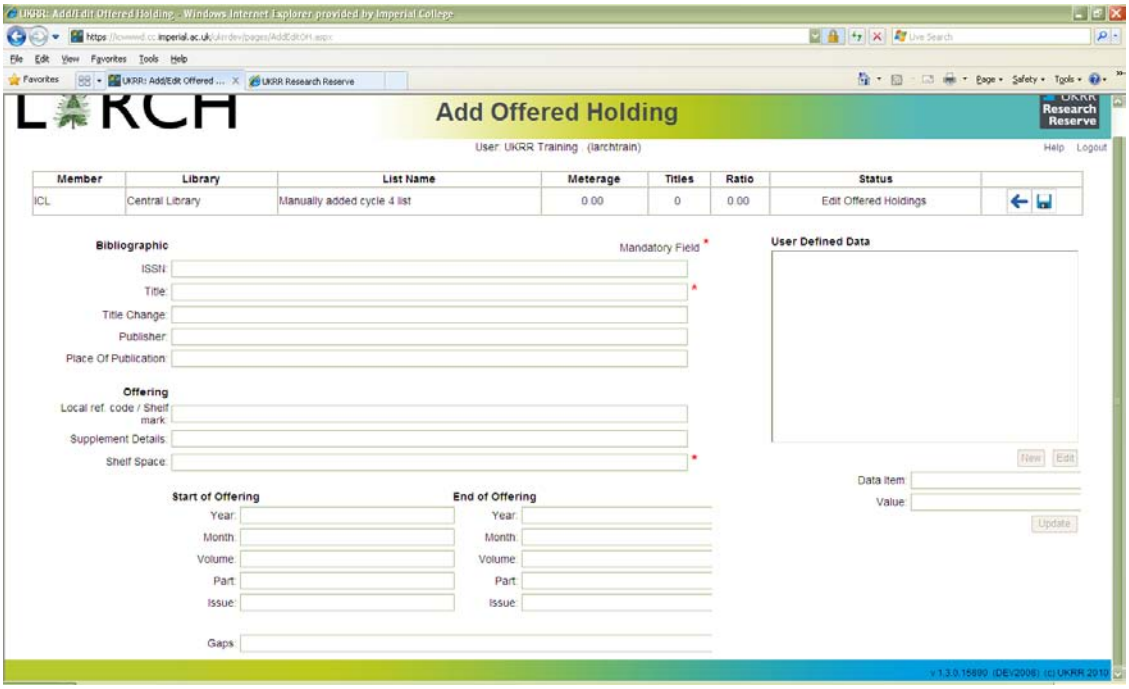
Step	Action
1.	To add holdings to a list click on the **Offered Holdings Administration** button (shown below) which is on the same row as the list name and metreage/number of holdings. **Note**: the Upload Offered Holdings From a File button will also be visible on this line, so if you change your mind you can upload from the template.



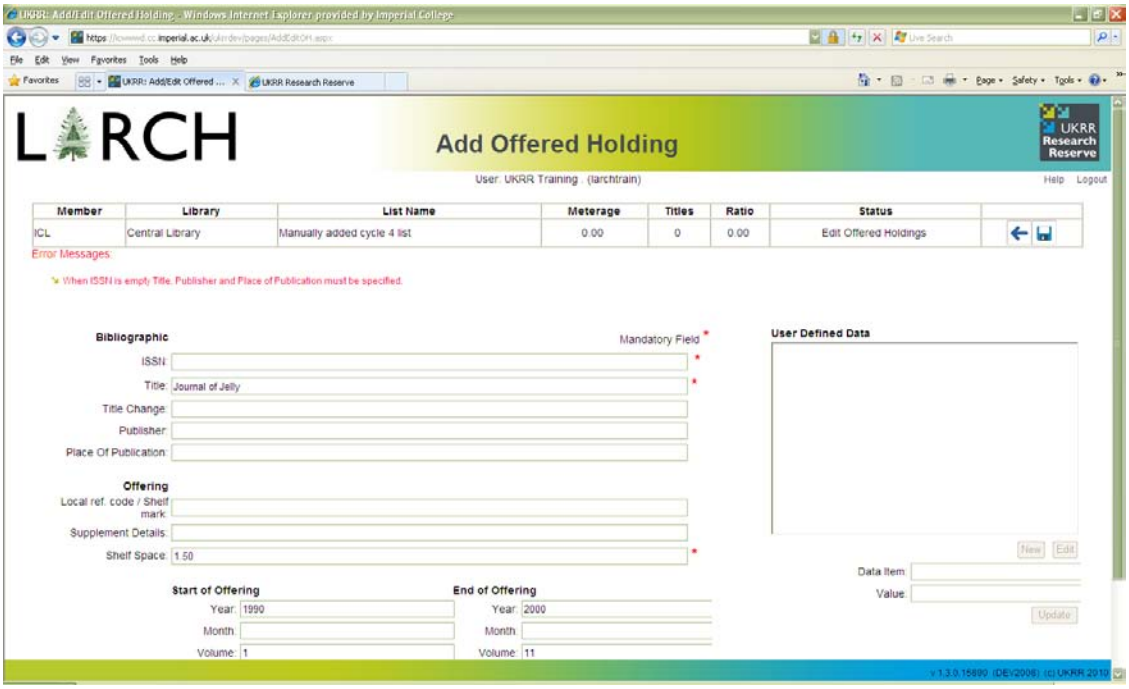
Step	Action
2.	You will be taken to the **Offered Holdings Administration** screen. To add holdings to the list click on the **Add Offered Holdings to the Cycle List** button (shown below).



Step	Action
3.	Enter the details of the holding in the relevant fields on the **Add Offered Holding** screen. Mandatory fields are marked with a red asterisk.



Step	Action
4.	Click the Save button (shown below). **Note**: The validation which is automatically performed on holdings uploaded from a list takes place when a manually added holding is saved. If any data is missing or doesn't meet the validation rules mentioned above then the error message will show in red on the screen as shown below.

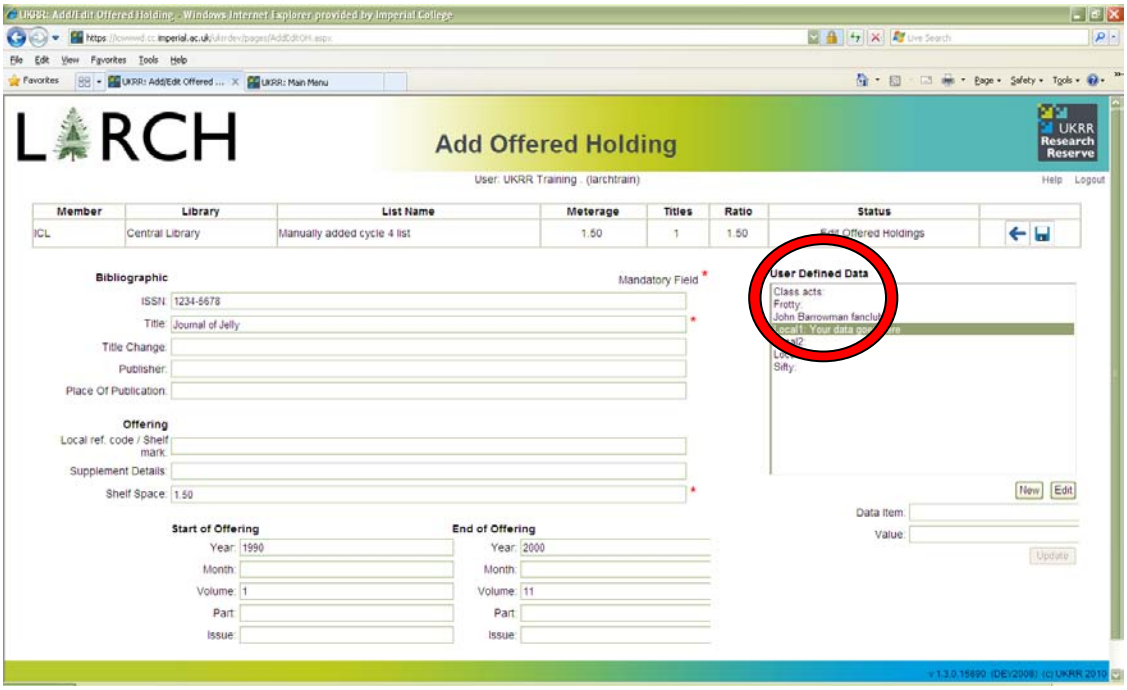


Step	Action
5.	Alter the data so that no error messages show when the 'Save' button is pressed.
6.	When you have finished adding the holding and have saved it click the **Back to offered holding administration screen** button (shown below). You can also use this button to exit the screen without saving any changes.

Adding user defined data

If you have put your offered holdings together using the template you can insert columns into the template to hold data which is useful for your own records, e.g. location of the item, e-access platform, etc... . This data will be stored in LARCH so you can access it again once you have a retention/disposal decision back from UKRR. You can also store data for your own purposes in LARCH be adding it to a holding manually.

Step	Action
1.	If you want to add User Defined Data to the holding for your own records you need to have first saved the holding in LARCH. The User Defined Data area is on the right of the Add Offered Holding screen. LARCH tries to be helpful by automatically suggesting data fields which you have used in the past. To add data against one of these items click on the item and then click the **Edit** button.
2.	The **Data Item** field will show the type of user defined data you are editing, and you can type the data you want to save in the **Value** field.
3.	If you would prefer to add a new data type not already listed click the **New** button and complete the 'Data Item' field with the name for the data you're storing, and put the data itself in the 'Value' field.

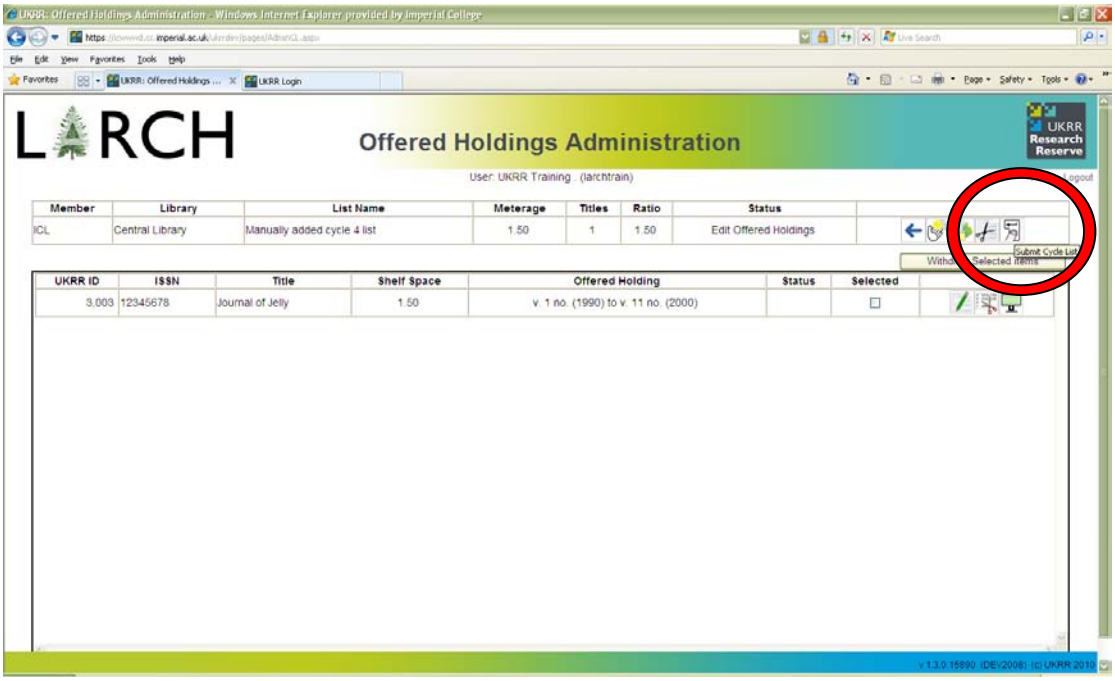


4.	When you are finished click the **Update** button, which will save the data value to the offered holding so it will be present on the reports you run against the list in future. Click the **Save** button to confirm any changes you've made, and then use the **Back** button to return to the 'Offered Holdings Administration' screen.

Submitting holdings

Once you have added all your holdings to a list, either by uploading from the template or entering them manually, then the process of submitting a list is quite easy as all the data validation issues will have already been taken care of.

Step	Action
1.	If you uploaded the holdings from the template double check that the file load was successful. If there is a figure for the Metreage and Offered Holdings make sure this is what you think it should be. If it shows zero for both it means you upload has failed (or you have uploaded an empty list) and you will need to try again.
2.	Click on the **Offered Holdings Administration** button (shown below) to be taken to the Offered Holdings Administration screen.
3.	This is your last chance to amend the offered holdings before you submit them, so it is worth checking they're all showing as you'd expect.
4.	Assuming you're happy with the holdings that are showing and you think the metreage and number of titles is correct, click on the **Submit Cycle List** button (shown below) which is located at the far right of the row of icons level with the list name and metreage.



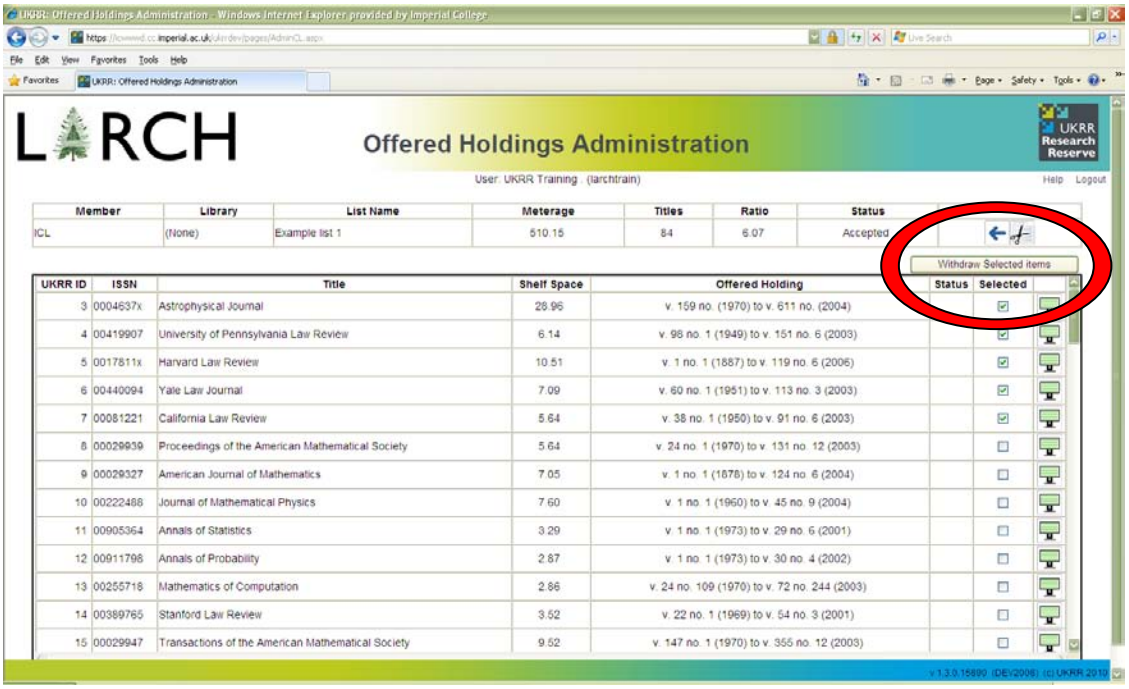
5.	LARCH will return you to the Main Menu, and your list will briefly show the status of 'Auto-Matching' as it checks for items that you have offered previously. If you click the refresh button on your browser after 30 seconds the status should have changed to 'Accepted'

Note: If your list shows the status of 'Waiting Manual Acceptance', it means you have offered more titles or metreage than was agreed before the start of the cycle. Your submission will need to be manually reviewed by UKRR before being accepted.

Withdrawing an item

Once an item has been added to LARCH it cannot be deleted, however you can withdraw if from your list of offerings.

Step	Action
1.	To withdrawn an item, from the Main Menu click the **Edit Holdings Administration** button (shown below) beside the list that the item was offered on.
2.	Tick the box in the 'Selected' column for each of the items that you wish to Withdraw.
3.	Click the **Withdraw Selected Items** button.



What happens next depends on what stage your list was up to when you made the withdrawal request:

Submission status	What happens next
Pre-submission	If your list hasn't yet been submitted (i.e. shows the status of Edit Offered Holdings) or has been reopened for you to amend (shows the status Edit After Submitting) then the items will be withdrawn and the status column will show Withdrawn
Post-submission	If you have submitted your list its status will change to 'Waiting for change authorisation' while UKRR confirm that it's okay to withdraw the item. The reason for this is that in the past some members have asked to withdraw items when they didn't really want to (it was just a bit of confusion), or have asked to withdraw items after they have already received funding for them. Once UKRR have reviewed the withdrawal request the list will be returned to 'Accepted' status and the items will show the status of Withdrawn.

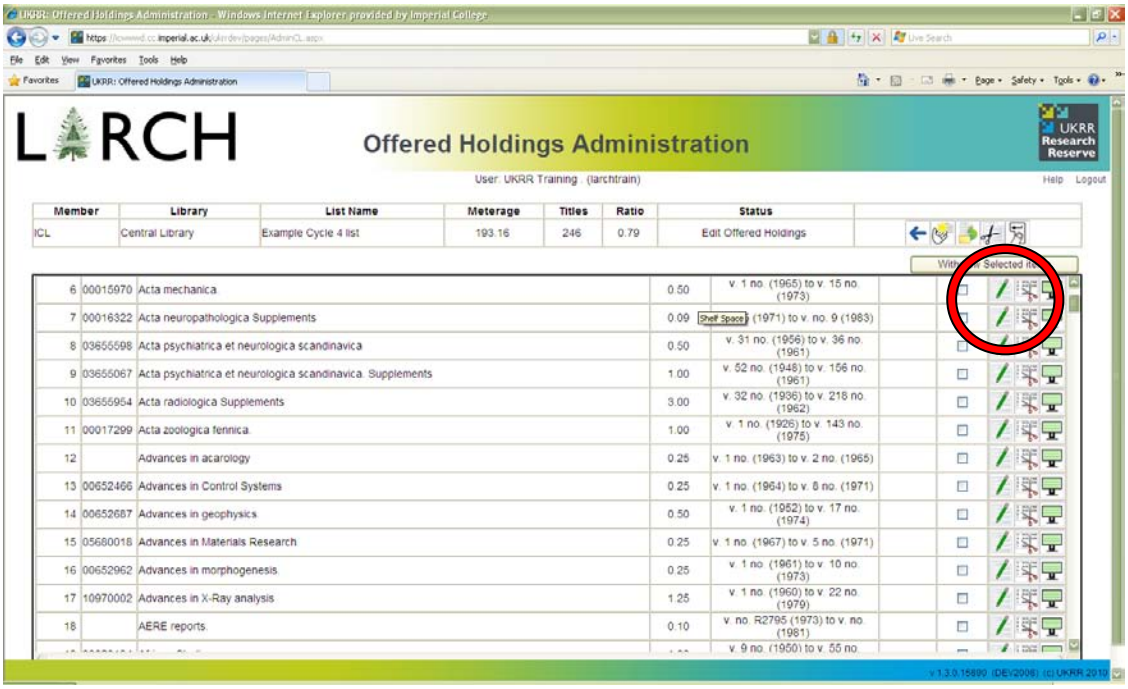
Editing holdings and lists

Editing individual holdings

You can only edit holdings before the list has been submitted (it has the status **Edit Offered Holdings**), or if the list has been reopened by UKRR for you to make amendments after submission (the list has the status **Edit After Submitting**). The reason for this is that as there is processing being undertaken at the BL and UKRR simultaneously, we need to ensure everyone's data is the same. If your list is not at one of these statuses and you wish to amend the holdings you can email UKRR asking that the list be reopened.

Assuming the list is at one of the statuses above that allows the editing of holdings, you can amend the holding as follows:

Step	Action
1.	On the Main Menu click on the **Offered Holdings Administration** button (shown below) for the list which has the holding you wish to amend.
2.	On the Offered Holdings Administration Screen locate the holding you wish to amend. **Note**: Each holding has a unique number called the UKRRid which can be a useful way of finding items, as this was also in the template which you might have used to upload the holdings originally.
3.	Click on the **Edit the Offered Holding** button (shown below) next to the holding to be edited.


Offered Holdings Administration
UKRR Research Reserve
User: UKRR Training (larchtrain)
Help Logout
Member
Library
List Name
Meterage
Titles
Ratio
Status
ICL
Central Library
Example Cycle 4 list
193.16
246
0.79
Edit Offered Holdings
Withdraw Selected Items
6 00015970 Acta mechanica 0.50 v. 1 no. (1965) to v. 15 no. (1973)
7 00016322 Acta neuropathologica Supplements 0.09 Shelf Space (1971) to v. no. 9 (1983)
8 03655598 Acta psychiatrica et neurologica scandinavica 0.50 v. 31 no. (1956) to v. 36 no. (1961)
9 03655067 Acta psychiatrica et neurologica scandinavica. Supplements 1.00 v. 52 no. (1948) to v. 156 no. (1961)
10 03655954 Acta radiologica Supplements 3.00 v. 32 no. (1936) to v. 218 no. (1962)
11 00017299 Acta zoologica fennica 1.00 v. 1 no. (1926) to v. 143 no. (1975)
12 Advances in acarology 0.25 v. 1 no. (1963) to v. 2 no. (1965)
13 00652466 Advances in Control Systems 0.25 v. 1 no. (1964) to v. 8 no. (1971)
14 00652687 Advances in geophysics 0.50 v. 1 no. (1952) to v. 17 no. (1974)
15 05680018 Advances in Materials Research 0.25 v. 1 no. (1967) to v. 5 no. (1971)
16 00652962 Advances in morphogenesis 0.25 v. 1 no. (1961) to v. 10 no. (1973)
17 10970002 Advances in X-Ray analysis 1.25 v. 1 no. (1960) to v. 22 no. (1979)
18 AERE reports 0.10 v. no. R2795 (1973) to v. no. (1981)
v. 9 no. (1950) to v. 55 no.

Step	Action
4.	Make the changes you want by altering the data on the screen. The fields are the same that are present in the UKRR template if you used this to upload your list, or on the Add Offered Holdings screen if you created the list manually. Once you have finished click the **Save** button (shown below) **Note:** You cannot save changes if it means that the holding would not meet the validation rules applied when the list was first uploaded or created. For a list of these rules see the Upload failure: data validation section above.
5.	When you have finished making changes and have saved them, or if you do not want to save the changes you have made, click the **Back to Offered Holding Administration** button (shown below) to return to the Offered Holding Administration screen.

Step	Action
6.	Repeat steps 3-5 to amend all the holdings you wish to edit. Once you are finished and are ready to submit the list of holdings click the **Submit Cycle List** button (shown below).
7.	If the amendments you made were to holdings that had previously been submitted, the list will wait at the status of 'Waiting Change Authorisation' until the amendments have been cleared by a UKRR administrator. If the list has not previously been submitted it will proceed as normal.

Editing the list

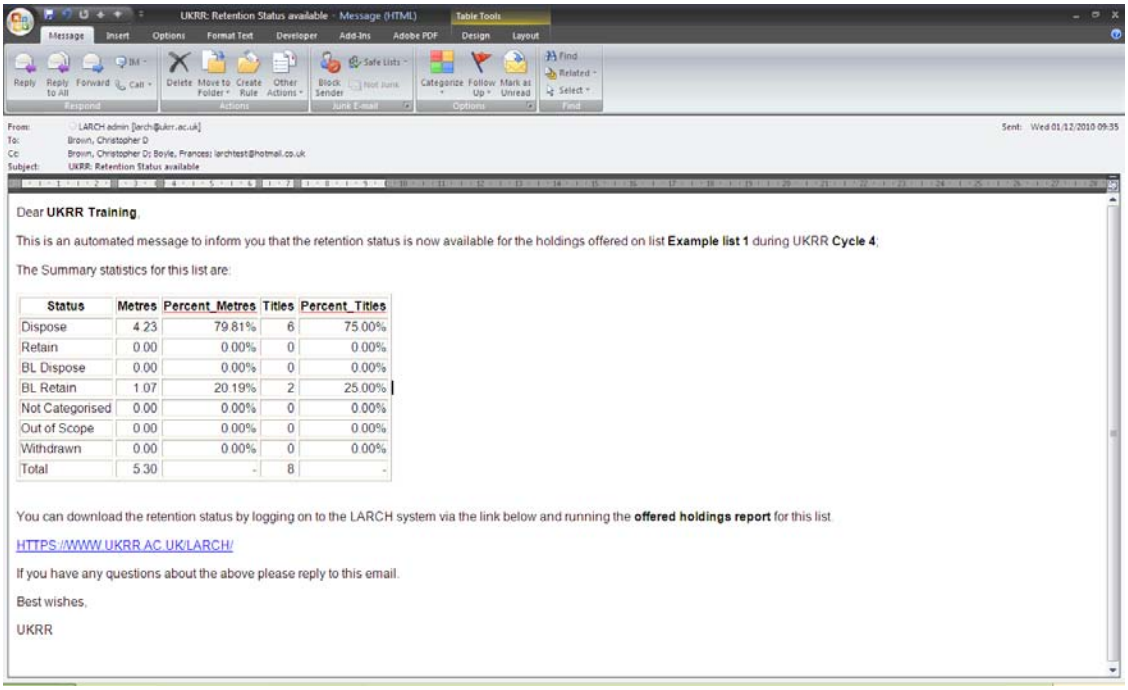
You can change the list name or the sub-library it is associated with even when the list has been accepted, as these details don't impact on the processing of the holdings you are offering on the list.

Step	Action
1.	On the Main Menu click on the **Offered Holdings Administration** button (shown below) for the list which you wish to amend.
2.	On the Offered Holdings Administration screen click the **Edit the Cycle List** button (shown below).
3.	On the Edit Cycle List screen you can change the Sub-library the list is associated with, or rename the list. When you're finished click the Save button, which will take you back to the Offered Holdings Administration screen.

Downloading Retention Values and BL Requests

One of the benefits of LARCH is that it does away with the multitude of spreadsheets that characterised earlier UKRR cycles. Consequently you will no longer receive a list of items directly from the BL saying what they would like to have from the material you have offered, this will be incorporated into the final response from UKRR giving the retention values for your list.

Once processing of a list of offered holdings by the BL and UKRR has been completed, users with the profile of Data Manager and Main Contact will receive an automated email from LARCH saying that the retention status is available to download. This email gives the name of the list and a summary of the different levels of retention and disposal.



UKRR: Retention Status available - Message (HTML)

Subject: UKRR: Retention Status available

Dear **UKRR Training**,

This is an automated message to inform you that the retention status is now available for the holdings offered on list **Example list 1** during UKRR **Cycle 4**.

The Summary statistics for this list are:

Status	Metres	Percent_Metres	Titles	Percent_Titles
Dispose	4.23	79.81%	6	75.00%
Retain	0.00	0.00%	0	0.00%
BL Dispose	0.00	0.00%	0	0.00%
BL Retain	1.07	20.19%	2	25.00%
Not Categorised	0.00	0.00%	0	0.00%
Out of Scope	0.00	0.00%	0	0.00%
Withdrawn	0.00	0.00%	0	0.00%
Total	5.30	-	8	-

You can download the retention status by logging on to the LARCH system via the link below and running the **offered holdings report** for this list.

HTTPS://WWW.UKRR.AC.UK/LARCH/

If you have any questions about the above please reply to this email.

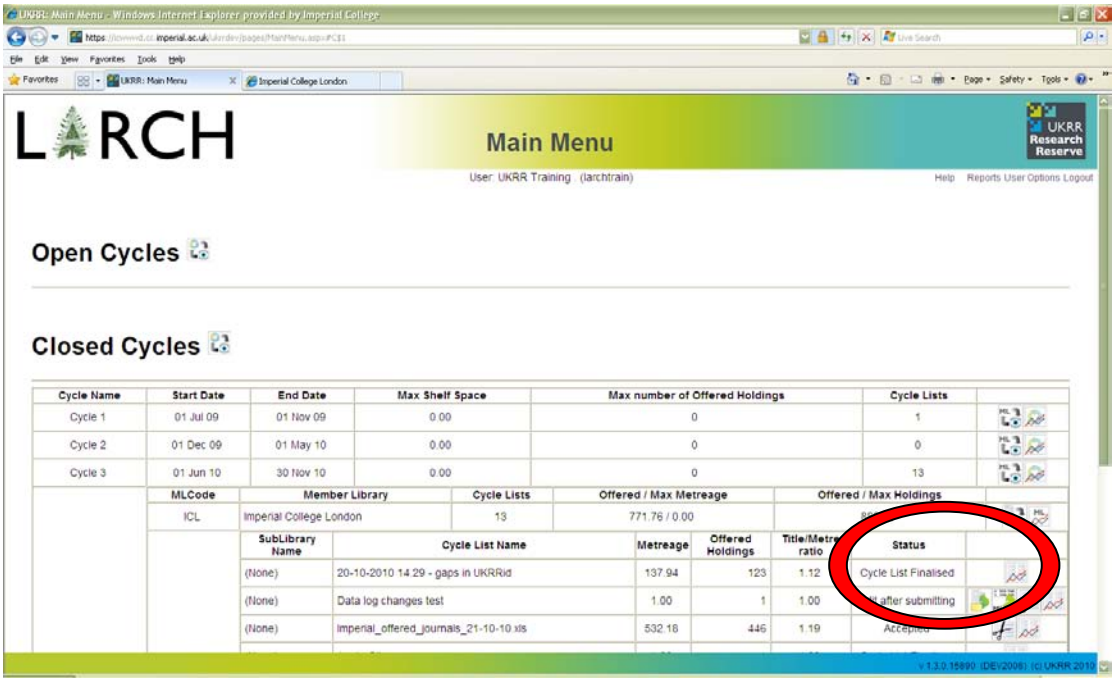
Best wishes,

UKRR

The retention values themselves are available to download from LARCH as a report. To access this report do the following.

Step	Action
1.	On the Main Menu locate the list. It will have the status of Cycle List Finalised.

Step	Action
2.	Click on the **Run a Cycle List Report** icon (shown below) which is to the right of the status column.



Step	Action
3.	Run the **Offered Holding Report** by clicking on the **Run the Selected** report icon (shown below).
4.	The report will show on the screen. As it's based on the UKRR template with all the corresponding data, it's very wide. You can download the report in a number of formats, see the 'Downloading Reports in Different Formats' section below for more information about them.

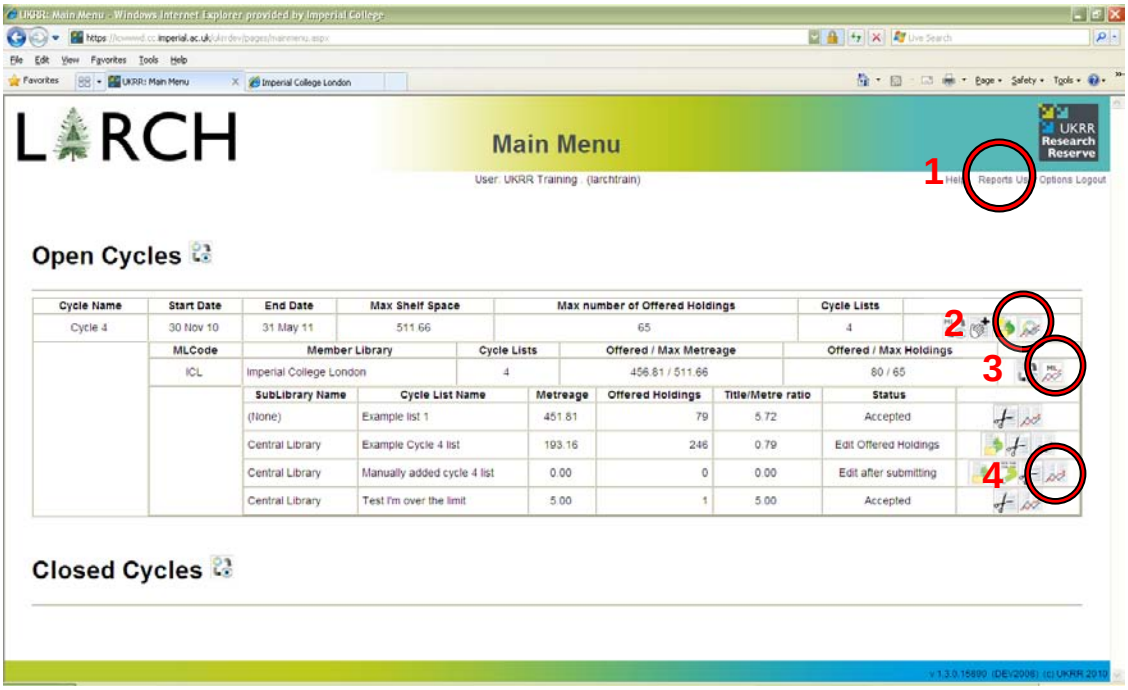
Reports

Visibility of reports

As mentioned in the ‘Changing user roles and details’ section above, your user role has an effect on what reports are visible to you in LARCH. See appendix 2 ‘What reports are visible to which user role?’ for a list of who can see what.

Location of reports in LARCH

Reports are available throughout LARCH to allow you to extract data relating to your UKRR offerings. You can find reports at 4 different locations on the Main Menu, with the location being determined by what the data relates to. The 4 different locations are shown in the screen shot below, with an explanation given in the table beneath.



Location number	Button/ Icon	Reports relate to	Description
1.	No button, uses a text link which says Reports	System options, or data spanning multiple cycles	Here you can see reports such as which user profiles receive which alerts, and who can see which reports. There are also reports relating to the overall levels of retention across all UKRR members, and the number of items requested by the BL.
2.		Data relating to one cycle	Here you can view a report showing the progress on other UKRR member libraries during the cycle, and the amount of material they have offered.
3.		Data relating to the UKRR Member Library	The only report visible at this level is a list of all items that have been offered to UKRR by your institution.
4.		An individual list of offered holdings	The reports visible here relate either to the history of the offered holdings, including system history reports and the original file uploaded, or the scarcity and BL data. **Note:** the offered holding report is the means by which you access the retention values for your offerings.

Additional Report buttons

On the reports screen there are a few other buttons.

Button/ Icon	
	Clicking this button runs the report again, but keeps you on the report screen.

Button/ Icon	
	If the report required you to select some options from a drop down menu before running it (e.g. a cycle number or institution), this button will take you back to the screen where you made the selection so you can change the options and rerun it.
	From a screen showing report results, this button will take you back to the reports screen. From the reports screen it will take you back to the Main Menu.

Downloading reports in different formats

Within the reports pages there are some other buttons that allow you to run the report and receive the results in different formats.

Button/ Icon	
	This button runs the report and downloads it to your computer as a CSV (Comma Separated Values) file.
	This button runs the report and downloads it as XML (Extensible Markup Language).
	This button runs the report and downloads it as an Excel spreadsheet.

Appendix 1: What emails are received by which user role?

UserRoleName	SendType	email alert	Subject
ML Data Manager	To	CycleStart	UKRR: Cycle Open Notification
	CC	Finalise	UKRR: Retention Status available
	To	ListOverdue	UKRR: List overdue reminder
	CC	SampleRequest	UKRR: BL Sample Request
	To	TargetSubmit	UKRR: List expected reminder
	To	UnWithdrawn	UKRR: Withdrawn item resubmitted
	To	Withdrawn	UKRR: Confirmation title has been withdrawn
ML General Admin	To	UnWithdrawn	UKRR: Withdrawn item resubmitted
ML Main Contact	To	CycleStart	UKRR: Cycle Open Notification
	To	Finalise	UKRR: Retention Status available
	To	ListOverdue	UKRR: List overdue reminder
	To	TargetSubmit	UKRR: List expected reminder
	To	UnWithdrawn	UKRR: Withdrawn item resubmitted
	To	Withdrawn	UKRR: Confirmation title has been withdrawn
ML Sample Request	To	SampleRequest	UKRR: BL Sample Request

Appendix 2: What reports are visible to which user role?

UserRoleName	Report Name	Description	Report Type
ML Data Manager	Sample Request Report	Report on the Offered Holdings in the Cycle List for which a Sample has been requested.	Cycle List
ML General Admin	All offerings	A list of all titles offered by the Member Library.	Member Library
ML General Admin	BL Response Y	Report on percentage of BL Response = Y for all Cycles	General
ML General Admin	Cycle List History	History log of the Cycle List.	Cycle List
ML General Admin	DataChangeLog	List of changes made for the Cycle List.	Cycle List
ML General Admin	email Recipients	List of who receives which email alert.	General
ML General Admin	File import errors	Errors importing files into the Cycle List	Cycle List
ML General Admin	File imported	File imported for the CycleList	Cycle List
ML General Admin	Finalised Percent	Report on percentage Finalised	General
ML General Admin	Finalised Percent for Cycle	Report on percentage Finalised for this Cycle	Cycle
ML General Admin	Offered Holding Report	Report on the Offered Holdings in the Cycle List.	Cycle List
ML General Admin	Offered Holding Scarcity	Scarcity Data	Cycle List
ML General Admin	Quick Summary	Quick Summary Report	General
ML General Admin	Report Recipients	List of who can run which report.	General
ML General Admin	Retention Values	Retention Values Report	General
ML General Admin	Sample Request Report	Report on the Offered Holdings in the Cycle List for which a Sample has been requested.	Cycle List

ML Main Contact	email Recipients	List of who receives which email alert.	General
ML Main Contact	Report Recipients	List of who can run which report.	General
ML Main Contact	Sample Request Report	Report on the Offered Holdings in the Cycle List for which a Sample has been requested.	Cycle List
ML Sample Request	email Recipients	List of who receives which email alert.	General
ML Sample Request	Report Recipients	List of who can run which report.	General
ML Sample Request	Sample Request Report	Report on the Offered Holdings in the Cycle List for which a Sample has been requested.	Cycle List